

Employee Post-Travel Disclosure of Travel Expenses

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Post-Travel Filing Instructions: Complete this form within 30 days of returning from travel. Submit all forms to the **Office of Public Records in 232 Hart Building.**

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☒ The **original** *Employee Pre-Travel Authorization* (Form RE-1), **AND**
- ☒ A **copy** of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

Private Sponsor(s) (list all): The Heritage Foundation 501(c)(3)

Travel date(s): May 31, 2019

Name of accompanying family member (if any): None

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING **DID NOT INCREASE** DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	\$60.00 - 32 passenger coach bus	None	\$38.00	None
<input checked="" type="checkbox"/> Actual Amount				

Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	Not Applicable	Not Applicable	Not Applicable	Not Applicable
<input type="checkbox"/> Actual Amount				

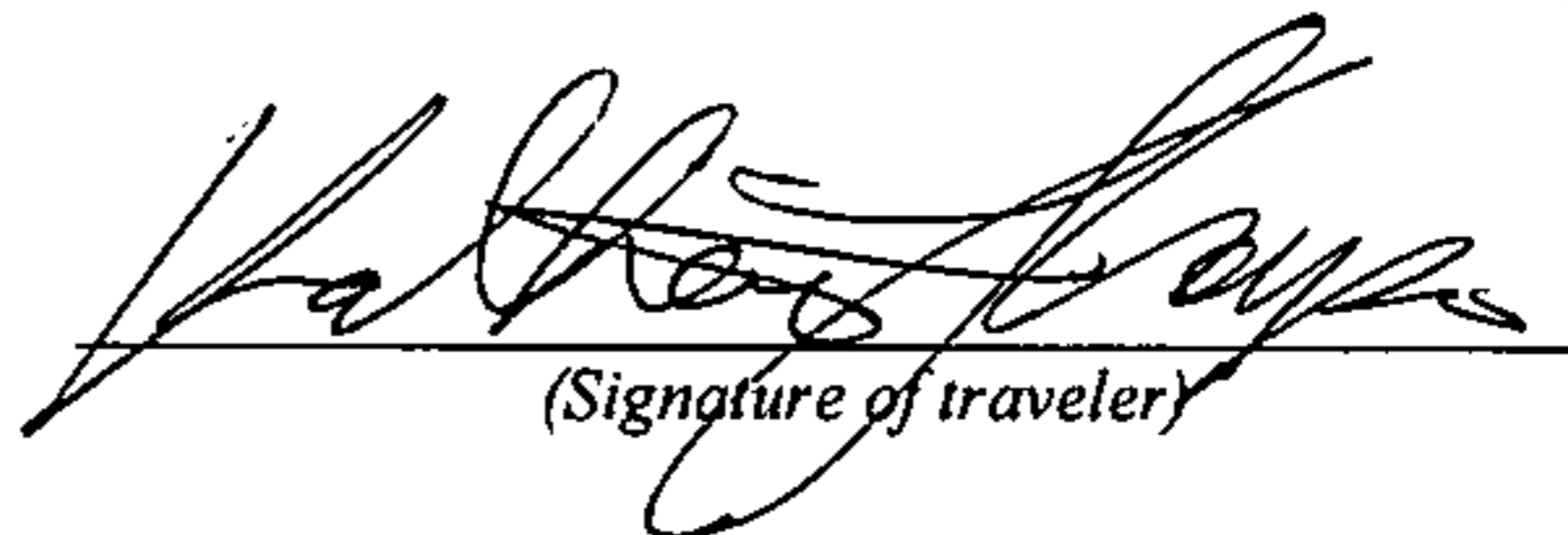
Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): Attended a leadership staff ride on the battlefield in Gettysburg, PA. We stopped at various spots on the battlefield to discuss the military and leadership principles associated with the particular battle scenario we were discussing at the time.

06/21/2019

(Date)

Katherine Thompson

(Printed name of traveler)

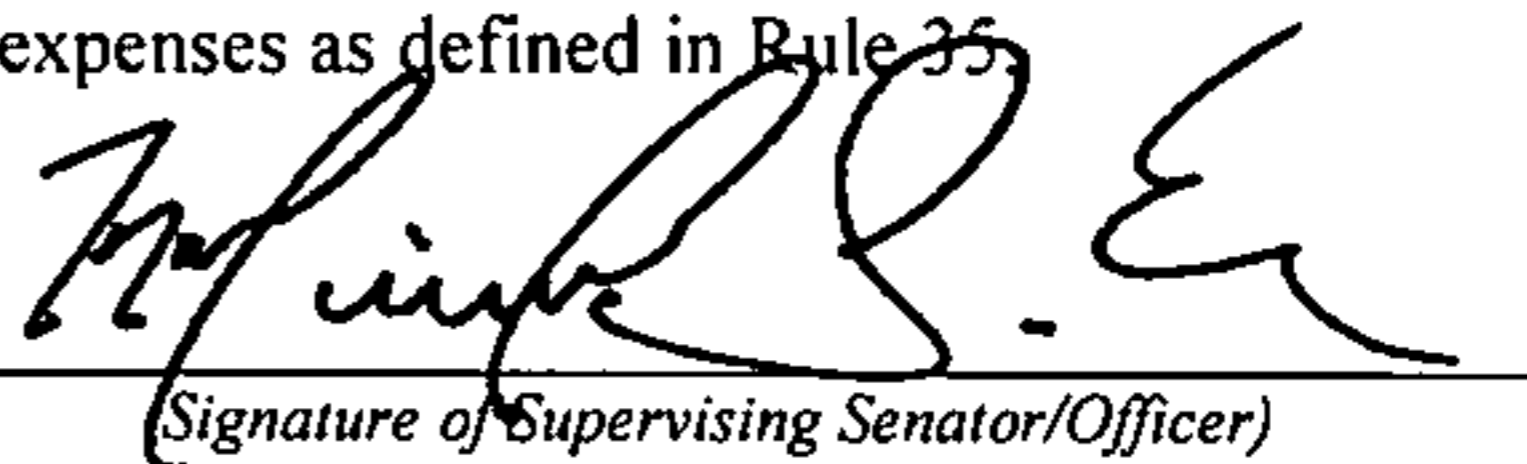

(Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

06/21/2019

(Date)


(Signature of Supervising Senator/Officer)

EMPLOYEE PRE-TRAVEL AUTHORIZATION

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics** in SH-220. Incomplete and late travel submissions will **not** be considered or approved. This form **must** be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Katherine Thompson

Name of Traveler: _____

Senator Mike Lee

Employing Office/Committee: _____

The Heritage Foundation

Private Sponsor(s) (list all): _____

Friday, May 31st 2019

Travel date(s): _____

Note: If you plan to extend the trip for any reason you must notify the Committee.

Gettysburg, PA

Destination(s): _____

Explain how this trip is specifically connected to the traveler's official or representational duties:

This day trip is an educational leadership staff ride conducted on the battlefield at Gettysburg. The lessons and experiences this trip will provide will bolster my ability as a staffer to think strategically, form reasoned recommendations to the member I serve on matters related to the U.S. military and national security, and allow me to further my leadership abilities by learning from the examples of the major players in the battle at Gettysburg.

Name of accompanying family member (if any): _____

Relationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

May 1st, 2019

(Date)

Katherine Lempere
(Signature of Employee)


TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

Majority, Secretary to
Michael S. Lee

Katherine Thompson

I, _____ hereby authorize _____
(Print Senator's/Officer's Name) *(Print Traveler's Name)*

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐ 

May 1st, 2019

(Date)


(Signature of Supervising Senator/Officer)

Subject: Marshall Fellowship Update
Date: Wednesday, May 15, 2019 at 12:18:33 PM Eastern Daylight Time
From: Palumbo, Brandon
Attachments: 2019 Gettysburg Day Trip Agenda.pdf

Hello Marshall Fellows,

I hope you all enjoyed the alumni reception and panel discussion last week. Please take a minute to fill out the event feedback form linked below. We are constantly looking for ways to improve our programs and your feedback is a great help.

Alumni Reception and Panel Feedback

The next Fellowship event is our day-trip to **Gettysburg National Military Park on Friday, May 31st**. I have attached the trip's itinerary here. We will be leaving from Heritage early Friday morning (breakfast will be provided) via bus and will be arriving back to D.C. in the evening so please dress comfortably. Last year we were lucky to have clear skies, but I would bring something like an umbrella or a jacket in case of rain.

I hope you all have managed to read *Killer Angels* as well as get into some of the reading material that our Gettysburg guide, Colonel Tom Vossler, sent us. Throughout the battlefield tour you will be asked various questions about the actions and strategies of your assigned historical personalities, so be prepared!

I am looking forward to seeing you all again. Please let me know if you have any questions.

Sincerely,

Brandon Palumbo

Brandon Palumbo
Program Associate, Congressional Relations
The Heritage Foundation
214 Massachusetts Avenue, NE
Washington, DC 20002
202-675-1784
heritage.org

9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and **one** overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

~~FOR~~

☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and **two** overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (*see questions 6 and 10*).

~~FOR~~

☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

As the sole sponsor of the trip, The Heritage Foundation has planned and will host the trip. Heritage's interest in hosting the event – per our mission below - is to provide a forum for discussion public policy as well as how we may learn and apply the decisions of the past to the issues of today.

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

The Heritage Foundation is a research and educational institution whose mission is to formulate and promote conservative public policy ideas. We are hosting this trip to further educate the attendees on the lessons of the past and how they apply to strategic leadership and grand strategy today.

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

The Heritage Foundation has a long history of sponsoring congressional travel including trips to the historic Gettysburg battlefield, the Virginia Military Institute, and the National Museum of the Marine Corps at Quantico.

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

The Heritage Foundation provides public seminars at our headquarters for the public to discuss ways to further our mission. Heritage also has staff throughout the country to meet with citizens regarding issues that are being debated in government or society and large.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate	\$60.00 - 32 passenger bus	None	\$38.00 - Breakfast, Lunch, Dinner	None
<input type="checkbox"/> Actual Amounts				

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

The trip involves an event that is organized specifically with regard to congressional participation.

18. Reason for selecting the location of the event or trip

Gettysburg was selected due to its rich history and strong examples of strategic leadership that can be applied today. It is an ideal place to utilize as a defense and foreign policy education site.

19. Name and location of hotel or other lodging facility:

None provided

20. Reason(s) for selecting hotel or other lodging facility:

None provided

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

The expenses for meals and travel arrangements are below the per diem rates.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

A 32 passenger coach bus will be chartered.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

None provided.

25. I hereby *certify* that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you *must* include a completed signature page for each additional sponsor):

Signature of Travel Sponsor:

Thomas Binion

Name and Title: Thomas Binion, Vice President of Government Relations

Name of Organization: The Heritage Foundation 501(c)3

Address: 214 Massachusetts Ave. NE, Washington, D.C. 20002

Telephone Number: (202) 608-6188

Fax Number:

E-mail Address: Thomas.Binion@heritage.org

5. Name and title of Senate invitees:

Name	Position	Office
Nicolas Adams	National Security Advisor	Senator Joni Ernst
Halie Craig	Legislative Assistant	Senator Pat Toomey
Katherine Thompson	Legislative Correspondent	Senator Mike Lee
Michael Callesen	Legislative Correspondent	Senator Rob Portman
Aaron Strickland	Deputy Military LA	Senator Lindsey Graham

The  **Heritage Foundation**
Gettysburg Battlefield Tour

Friday, May 31, 2019
Gettysburg National Military Park

7:15 a.m. **Bus Arrives** Washington, D.C.
The Heritage Foundation
214 Massachusetts Ave NE

7:30 a.m. **Fellows Check-In and Load Bus**

8:00 a.m. **Bus Departs**

8:00 – 10:00 a.m. **Travel to Gettysburg, PA**
Dr. Steve Bucci gives strategic overview

***This trip is to provide the Fellows with the opportunity to study American military leadership and strategy in the context of the American Civil War. Each Fellow is expected to learn what exactly the tactics and strategies of the Battle of Gettysburg's historical participants were at the time. The battlefield guide, Colonel Tom Vossler (Ret.), will constantly be asking the Fellows questions about why certain actions were taken and how they can apply that knowledge in their current roles. As national security and foreign policy professionals, this relates to their official duties by increasing their knowledge of U.S. government policies and their historic ramifications.**

10:00 – 11:30 a.m. **McPherson's Ridge** Gettysburg, PA
Forenoon First Day of Battle

***During the first stop at McPherson's Ridge, Colonel Tom Vossler (Ret.) will show the strategic locations of U.S. military forces, and ask the Fellows to briefly present their knowledge of specific people and/or events during the first day of the battle. This relates to their official duties by demonstrating to the Fellows how tactics and strategy are enacted in real time.**

11:30 – 12:00 p.m. **Oak Hill/Oak Ridge/Seminary Ridge**
Pick up box lunches from Biggerstaff's

***During the second stop at Oak Hill, Colonel Tom Vossler (Ret.) will teach the Fellows about how the terrain of the surrounding area affected the people at the time. The Fellows will be asked to give recommendations on how the historical figures could have dealt with the problems they faced. This relates to their official duties by demonstrating how geography can still affect policymaking.**

12:00 – 12:45 p.m. **Lunch at The Refectory (Lutheran Seminary)**
Leadership Challenge

***The lunch break will include the "leadership challenge" led by the battlefield guide, Colonel Tom Vossler (Ret.). Colonel Vossler will ask each of the Fellows about their assigned material including the rationale of historic policymakers. This relates to their official duties by demonstrating to the Fellows how the decisions of key historical figures were able to shape the outcome of their implemented strategies.**

12:45 – 1:45 p.m. **Seminary Ridge**
North Carolina Memorial

***During the fourth stop at the North Carolina Memorial, Colonel Vossler (Ret.) will give a lecture about how**

